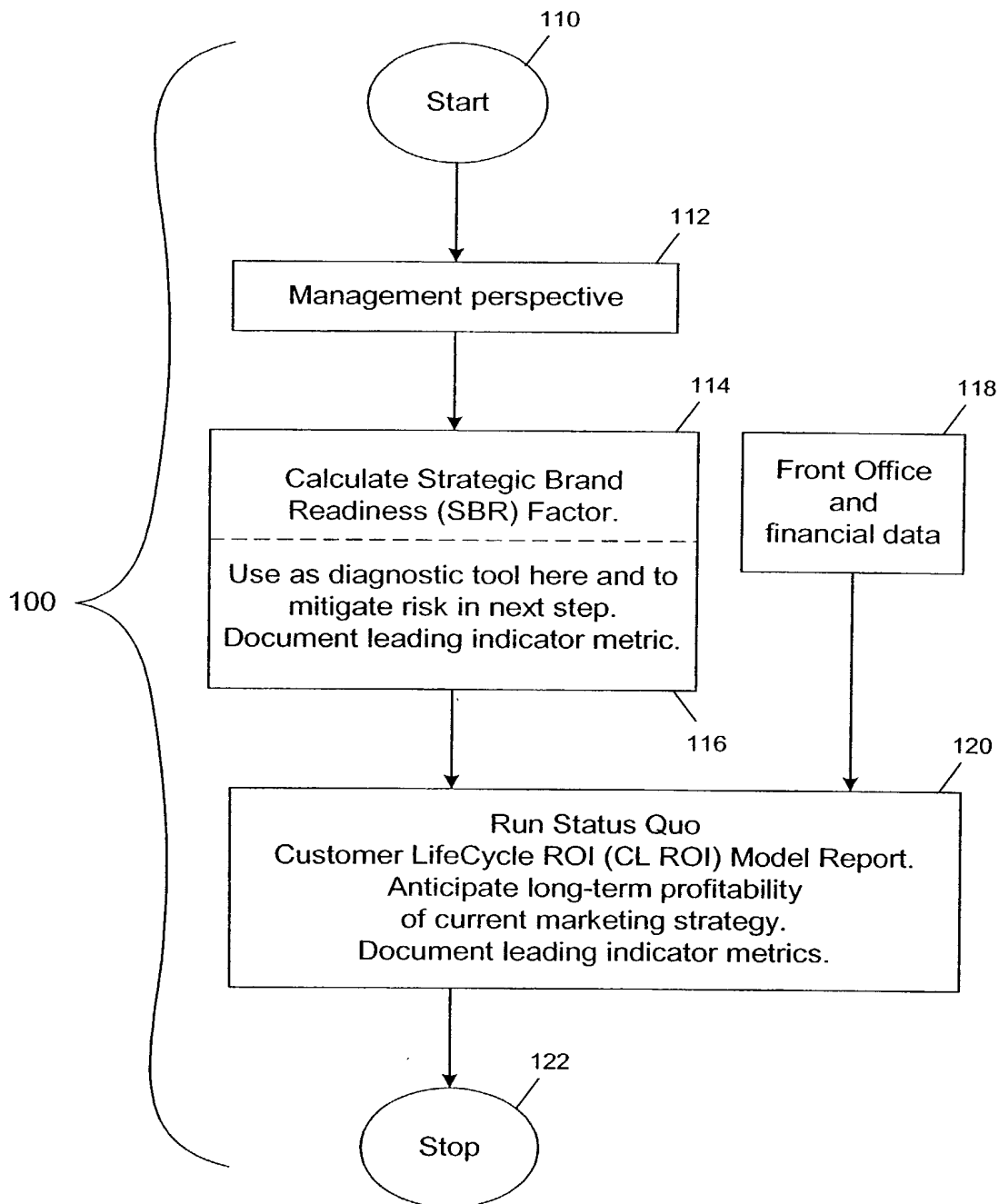


**FIG. 1/62**



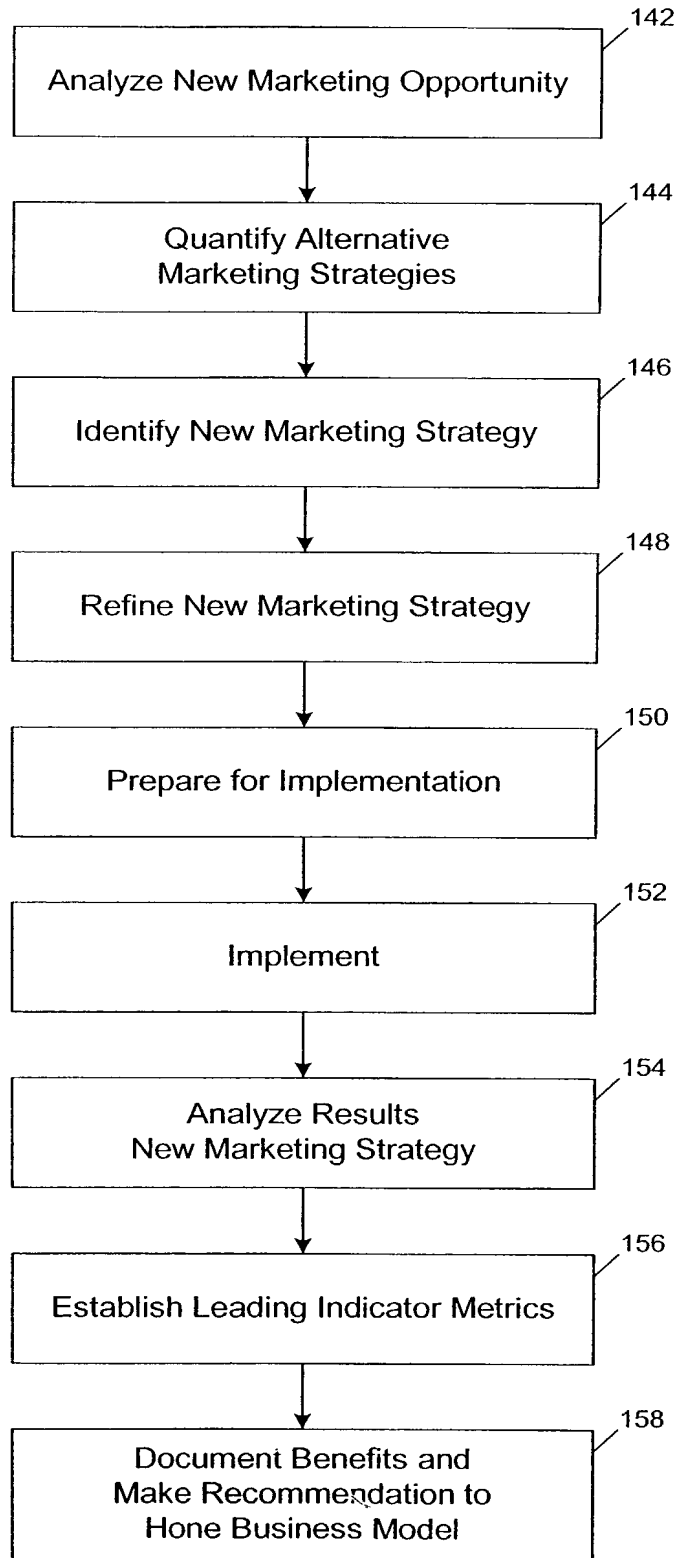
**FIG. 3/62**

98



**FIG. 4/62**

140



**FIG. 5/62**

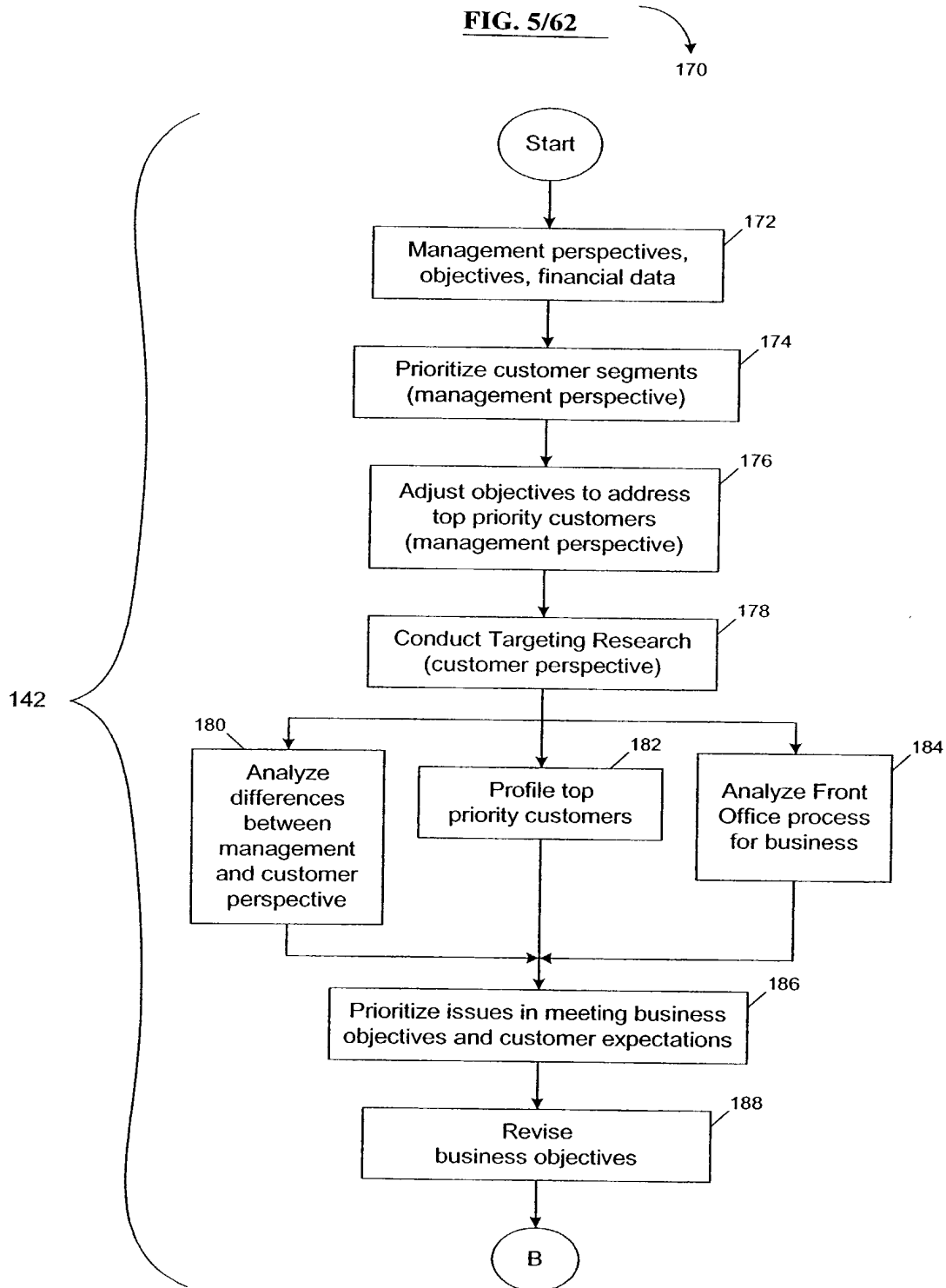


FIG. 6/62

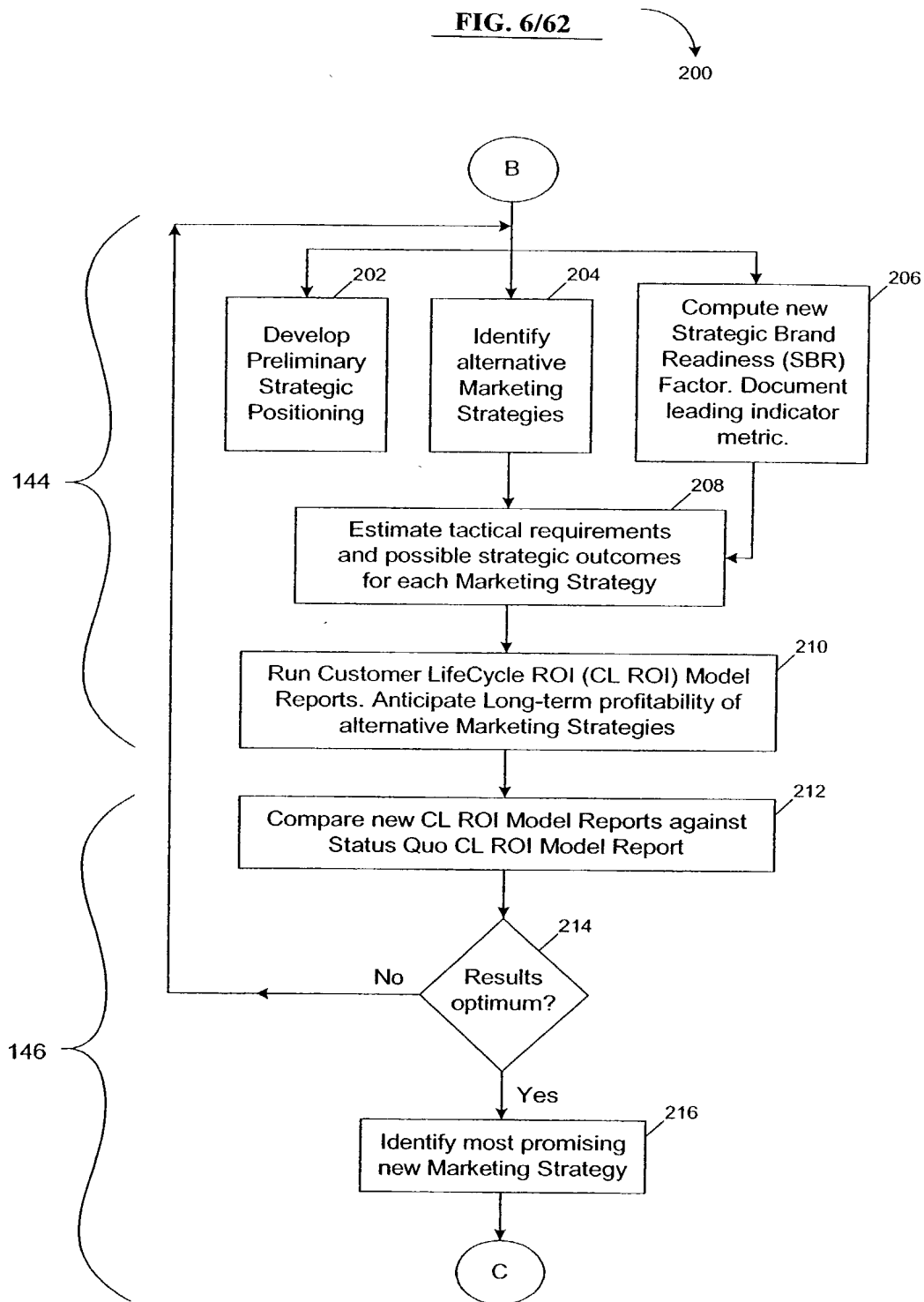
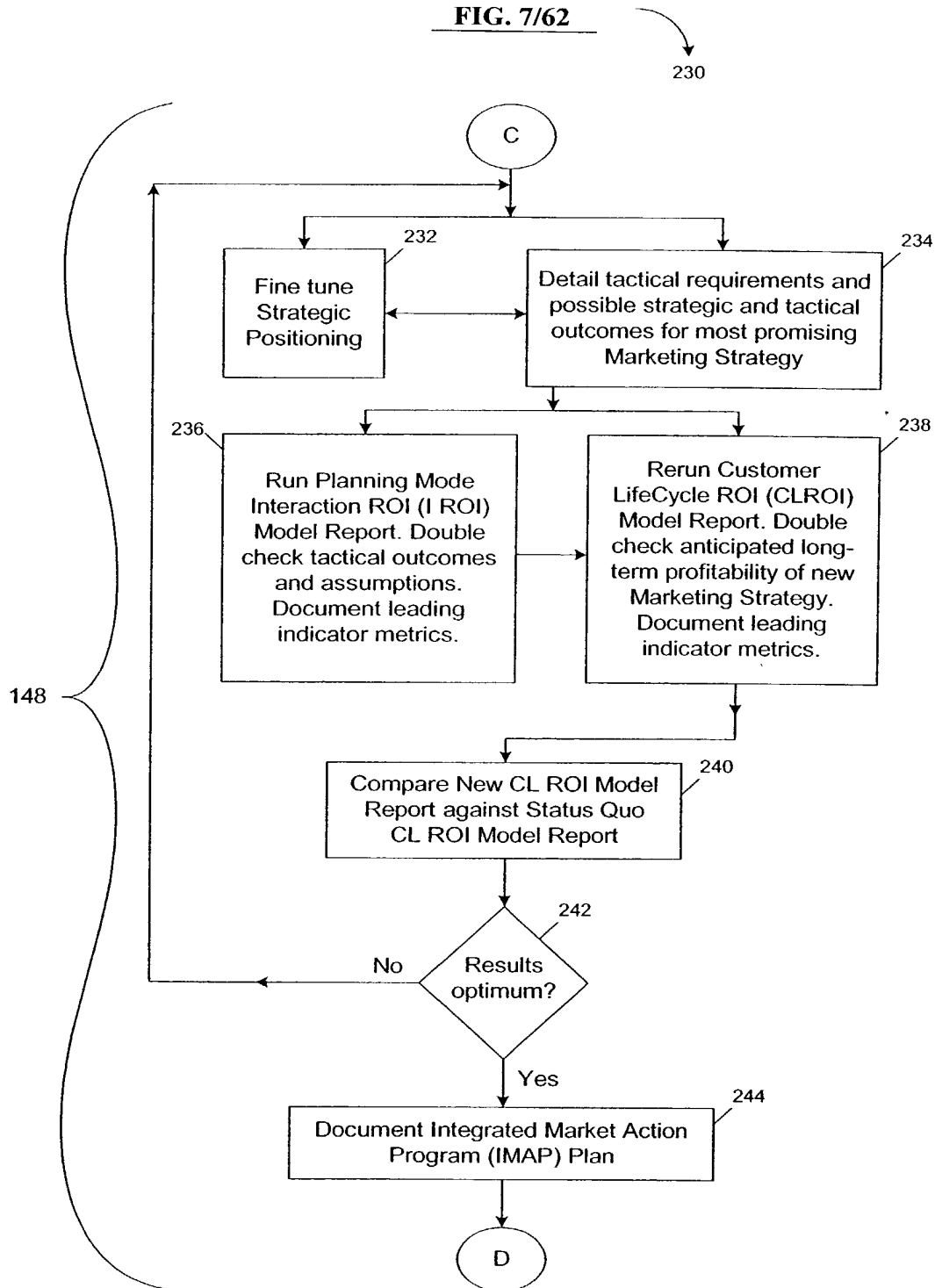
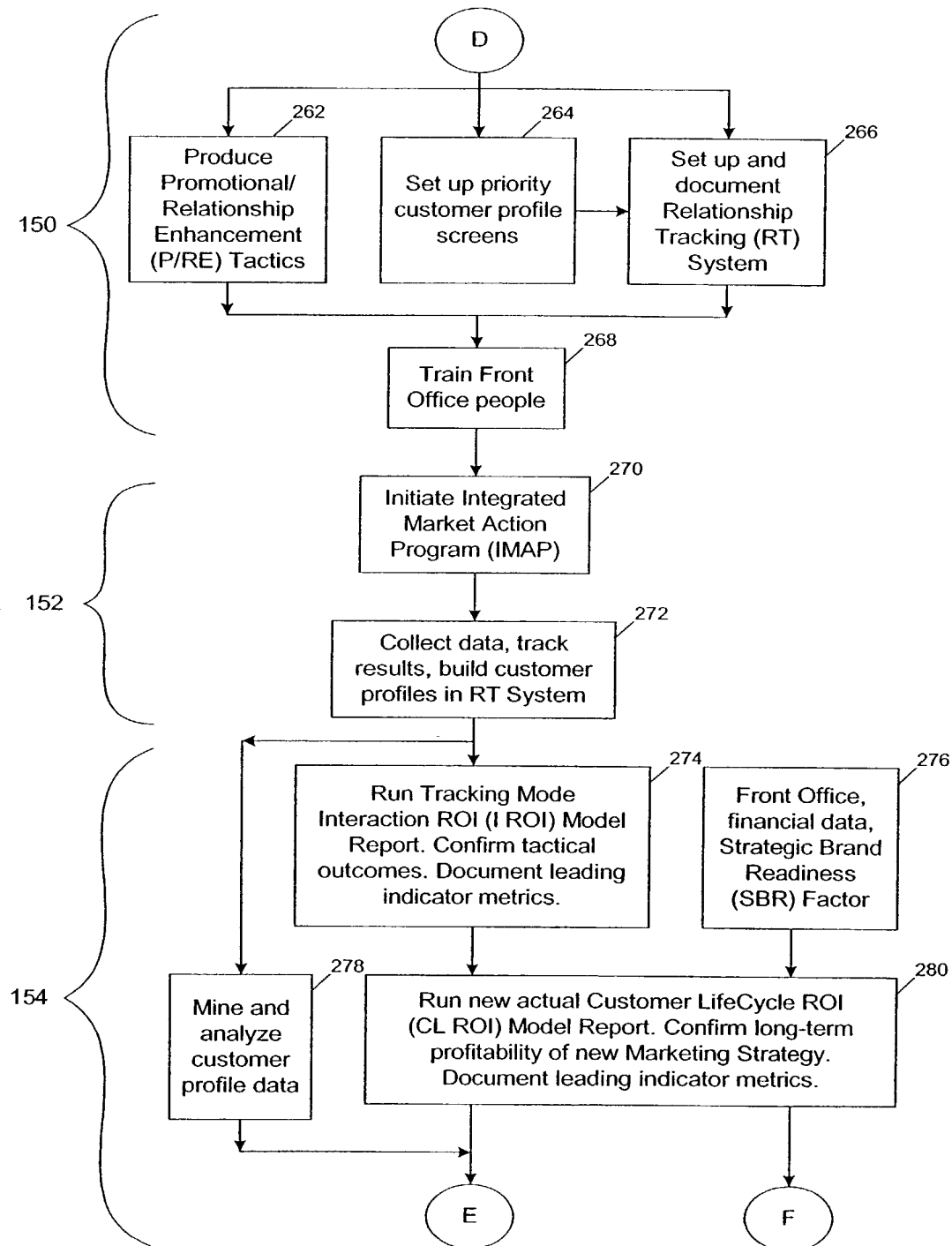


FIG. 7/62

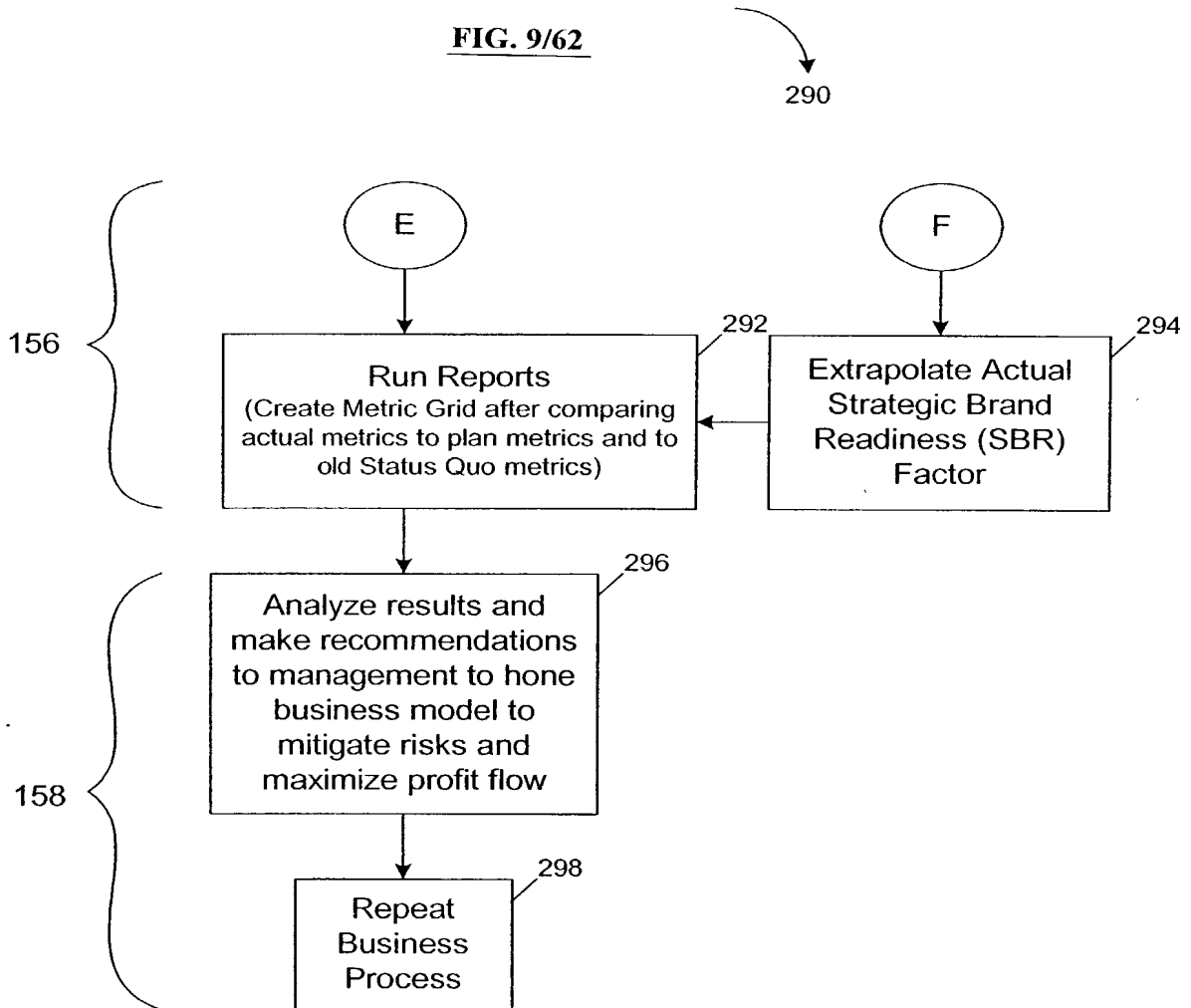


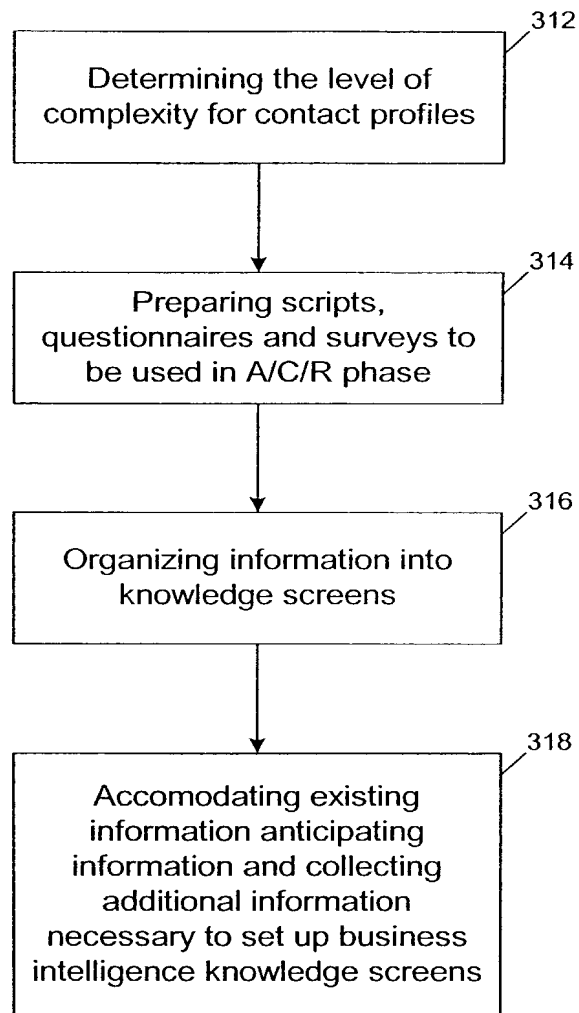
260





**FIG. 9/62**





**FIG. 10/62**

310

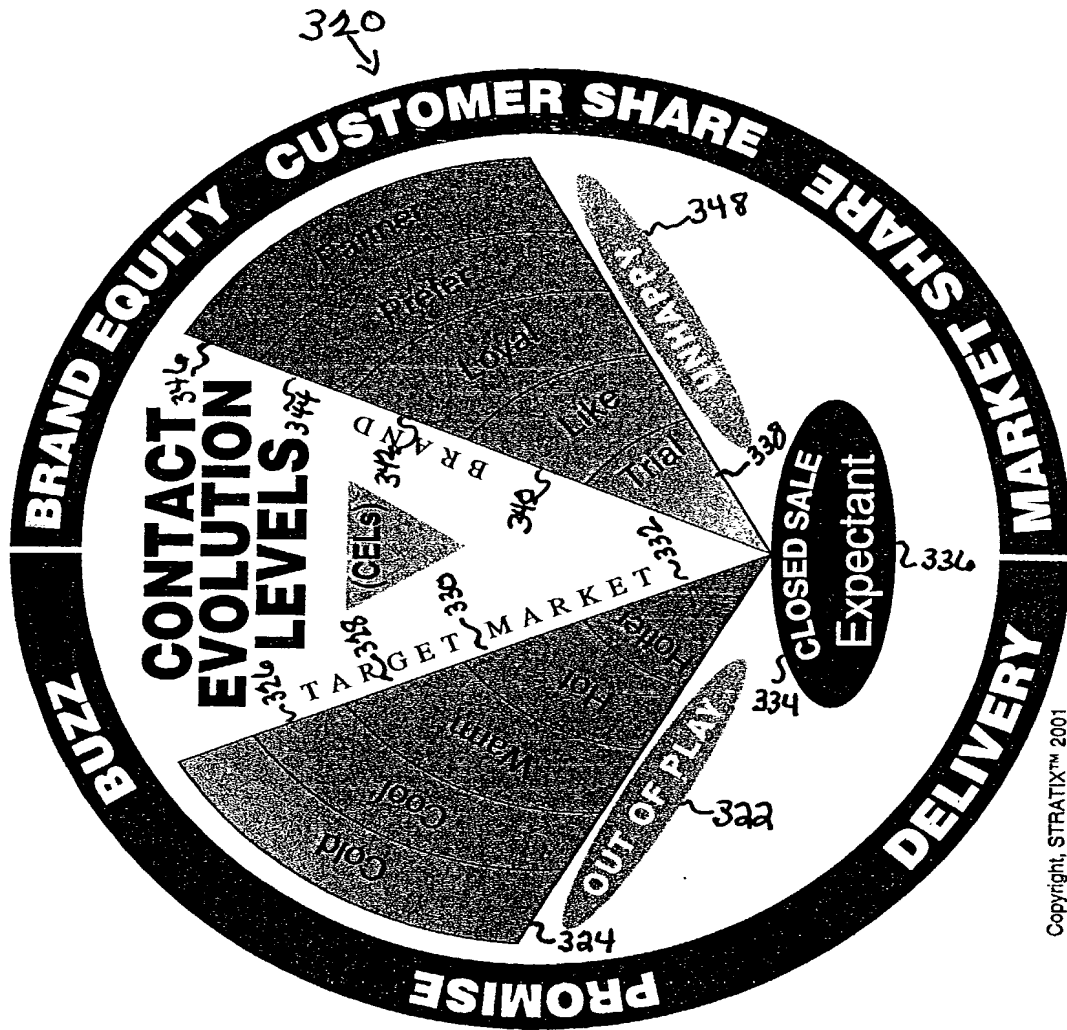


FIG. 11/62

# TACTICS PLAN OVERVIEW

Closed-loop Marketing, Sales, Customer Care

(EXAMPLE: XYZ Company)

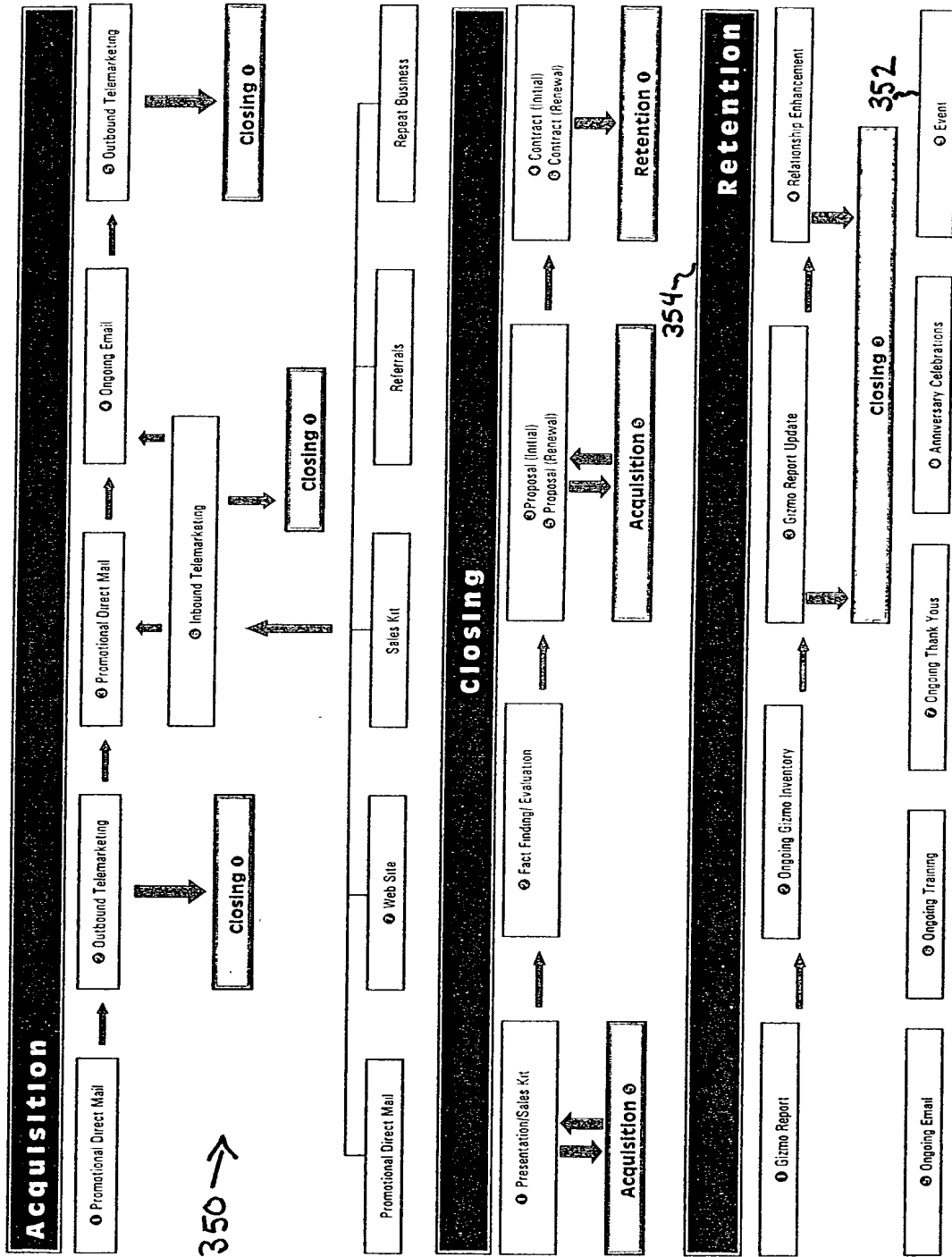


FIG. 12/62

## Tactics Grid

Promotional/Relationship Enhancement Tactics	Phases		
	Acquisition	Closing	Retention
Advertising	X		
Promo. Direct Mail	X		
Telemarketing	X		
Sales Promotion	X	X	
Seminars/Conferences	X	X	X
Trade Shows	X	X	X
Special Events	X	X	X
Presentations		X	
Sales Materials		X	
Status Reports		X	X
Documentation	X	X	X
Training			X
Technical Support			X
Company Literature	X	X	X
Newsletters	X	X	X
Web Site	X	X	X
Public Relations (PR)	X	X	X
Ongoing Telemarketing	X	X	X
Ongoing Direct Mail	X	X	
Ongoing PR	X	X	X
Email Campaigns	X	X	X
Ongoing Thank Yous	X	X	X
Web Newsletter	X	X	X
Web Advertising	X		
Web Sponsorships	X		X
Web PR	X	X	X
Community	X	X	X
Ecommerce	X	X	X
Sponsorships	X	X	X
Strategic Alliances	X	X	X
Viral Marketing	X	X	X
Affinity Marketing	X	X	X
Coop Advertising	X		
Cross Selling Programs		X	X
Recognition Programs			X
Charitable Contributions			X

360



Personal Interaction Tactics	Acquisition	Closing	Retention
Custom Communication	X	X	X
Custom Interaction		X	X
Personal Touch	X	X	X
Extraordinary Events	X	X	X

FIG. 13/62

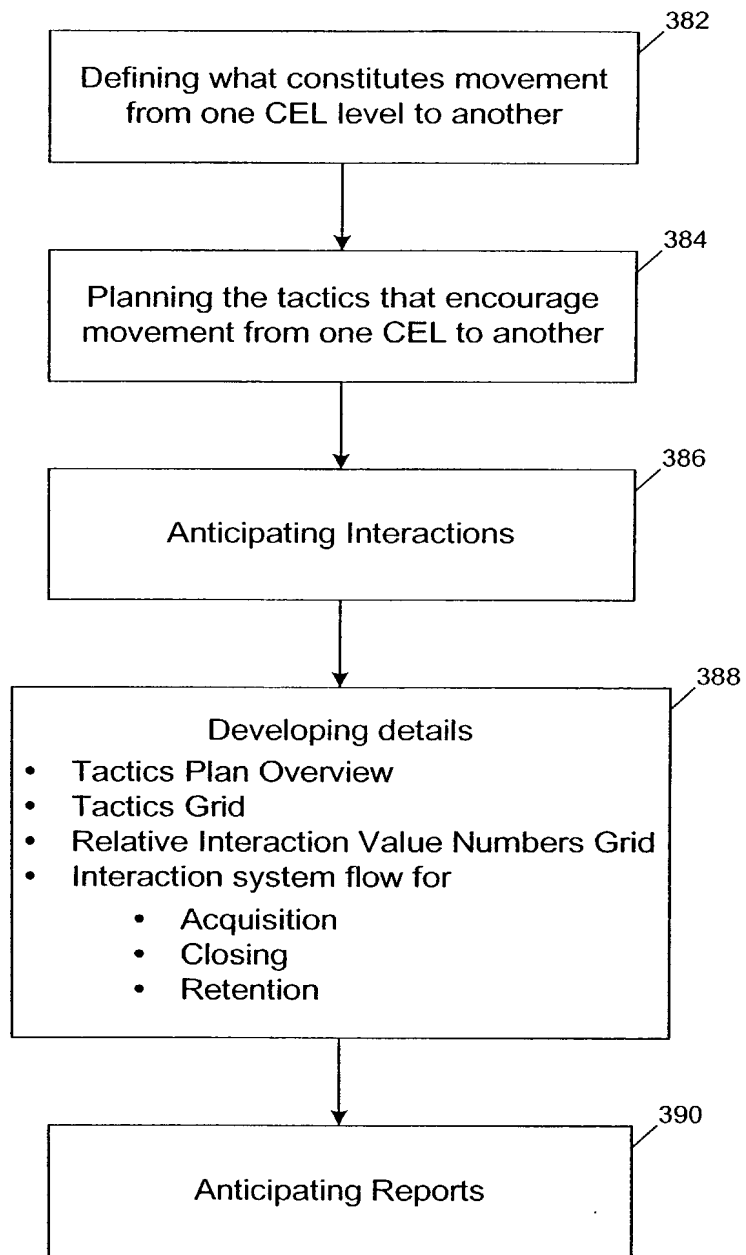
370

## Relative Interaction Value (RIV) Number Grid

Promotional/Relationship Enhancement Tactics	Phases		
	Acquisition RE+ Impt=RIV#	Closing RE+ Impt=RIV#	Retention RE+ Impt=RIV#
Advertising	.000+.010=.010		
Promo. Direct Mail	.010+.020=.030		
Telemarketing	.030+.010=.040		
Sales Promotion	.030+.030=.060	.030+.070=.100	
Seminars/Conferences	.050+.020=.070	.010+.030=.040	.020+.050=.070
Trade Shows	.010+.010=.020	.010+.020=.030	.010+.030=.040
Special Events	.080+.060=.140	.080+.060=.140	.090+.080=.170
Presentations		.050+.050=.100	
Sales Materials		.000+.040=.040	
Status Reports		.070+.080=.150	.090+.010=.180
Documentation	.000+.010=.010	.000+.060=.060	.010+.070=.080
Training			.050+.070=.120
Technical Support			.080+.080=.160
Company Literature	.000+.010=.010	.000+.010=.010	.000+.020=.020
Newsletters	.000+.010=.010	.000+.010=.010	.070+.040=.110
Web Site	.030+.030=.060	.040+.040=.080	.060+.060=.120
Public Relations (PR)	.000+.050=.050	.000+.030=.030	.000+.040=.040
Ongoing Telemarketing	.060+.020=.080	.020+.010=.030	.010+.020=.030
Ongoing Direct Mail	.010+.030=.040	.010+.010=.020	
Ongoing PR	.000+.030=.030	.000+.010=.010	.000+.020=.020
Email Campaigns	.020+.020=.040	.020+.040=.060	.020+.040=.060
Ongoing Thank Yous	.100+.080=.180	.100+.080=.180	.100+.090=.190
Web Newsletter	.010+.010=.020	.010+.010=.020	.080+.040=.120
Web Advertising	.010+.010=.020		
Web Sponsorships	.010+.020=.030		.010+.020=.030
Web PR	.000+.020=.020	.000+.010=.010	.000+.020=.020
Community	.050+.050=.100	.060+.060=.120	.070+.070=.140
Ecommerce	.030+.050=.080	.050+.050=.100	.030+.040=.070
Sponsorships	.030+.030=.060	.030+.040=.070	.030+.030=.060
Strategic Alliances	.030+.030=.060	.030+.040=.070	.030+.030=.060
Viral Marketing	.050+.050=.100	.060+.060=.120	.050+.050=.100
Affinity Marketing	.050+.040=.090	.030+.060=.090	.050+.040=.090
Coop Advertising	.010+.030=.040		
Cross Selling Programs		.060+.040=.100	.100+.080=.180
Recognition Programs			.100+.100=.200
Charitable Contributions			.080+.050=.130

Personal Interaction Tactics	Acquisition	Closing	Retention
Custom Communication	.060+.060=.120	.080+.070=.150	.070+.080=.150
Custom Interaction		.080+.070=.150	.070+.080=.150
Personal Touch	.100+.080=.180	.100+.080=.180	.100+.090=.190
Extraordinary Events	TBD	TBD	TBD

FIG. 14/62



**FIG. 15/62**

380



ACCESS



STRATIX™

Relationship  
Tracking  
System

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394

Login Name: \_\_\_\_\_

Password: \_\_\_\_\_



396

392  
↑

FIG. 16/62





**PRIORITY  
ACTION**

- 410 Interaction
- 412 Priority Action
- 414 Search Contact
- 416 Add Contact
- 418 Add Relationship

**Planned Interactions — 402**

Go To	Interaction Date	Interaction	Contact	Company	Phone	CEL#
	02-17-01	A2-2 Attempt Call	Mary Meu	Lily Corporation	800-123-4567	1.180
	02-17-01	A2-7 Ongoing Thank You	N.T. Palm	FishTail Company	888-321-7654	4.000

**Past Due Interactions — 404**

Go To	Interaction Date	Interaction	Contact	Company	Phone	CEL#
	01-31-01	A2-2 Attempt Call	Percy Resque	Floraluv	800-109-8765	2.040



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Relationship  
Tracking  
System

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FIG. 17/62

400  
↩



N.T. Palm  
CTO  
888-321-7654  
ntpalm@fishtail.com  
x\_Email Permission

FishTail Company  
One Green Street  
Suite 17  
San Francisco CA 94123  
CEL# 4 000



## INTERACTION

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility

Select Contact Information

Choose From

Select Profiling Questions

Choose From

Select Knowledge Screening

Choose From

## Planned Interaction

Date	Interaction
02-17-01	A2-7 Ongoing Thank You's

EDIT

## Current Interaction

User	Date	Interaction	Response
		Choose From <input type="text"/>	Choose From <input type="text"/>
Notes			

ADD

Next Interaction Date	Next Interaction
	Choose From <input type="text"/>

REPLACE

## Interaction Record



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FIG. 18/62

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430

[HOME](#)
[BACK](#)
[END](#)
[NEXT](#)
[TOP](#)

440 ↗



## SEARCH CONTACT

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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Tracking  
System

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### Sort Database By

1st Search Parameter  2nd Search Parameter  3rd Search Parameter



Select Contact From Sorted Database

Select a Contact



Search Contact  
By:

Minimum

Maximum

CEL#	Minimum	Maximum
Last Interaction Date	02-12-01	02-16-01
Planned Interaction Date	02-25-01	03-01-01

First Name

Last Name

Company Plants Unlimited



Select Contact From Search-Filtered Database

Select a Contact



460 ↗

FIG. 21/62



↑ 500



	1/20/01	C3-1 Set Initial Proposal Meeting		4 895	
Npatel ▼					
	1/15/01	C2-7 Thank You For Facts	C2-7b Thank You Email	4 820	
Npatel ▼					
	1/14/01	C2-5 Meeting On Facts	C2-5d Our Facts Have Enough	4.730	
Npatel ▼					
	1/12/01	C2-4 Set Meeting Confirm Facts		4 680	
Npatel ▼					
	1/10/01	C2-3 Premium Fact Finding		4.605	Very cooperative.
Npatel ▼					
	1/9/01	C2-1 Follow Up Fact Finding	C2-1i Set Meeting To Get Facts	4 455	Doesn't have time to do on own afterall. Wants us to do.
Npatel ▼					
	1/4/01	C1-2 Thank You For Appointment	C1-2a Thank You Note	4.380	Offered to get facts, if need be.
Npatel ▼					
	1/3/01	C1-1 Initial Appointment	C1-1bb Customer To Develop Facts	4.260	Wants to do as much as they can, thinks will be faster.
Npatel ▼					
	1/2/01	A4-1 Monthly Email Tip		4.210	
Npatel ▼					
	1/2/01	C1-1 Initial Appointment	C1-1a Confirm Appointment	4.170	
Lsharp ▼					
	12/21/00	A2-7 Ongoing Thank Yous	A2-7a Thank You Note	4.120	Reminded name of person who will come to see.
Lsharp					

FIG. 24/62

520 ↗



▼	12/21/00	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt	4 000	Has a go ahead from others
Lsharp ▼	12/20/00	A2-6 Live Conversation	A2-6a Call Back 12/21/00	2 080	Doesn't have feedback yet on email.
Lsharp ▼	12/19/00	A2-6 Live Conversation	A2-6d Send Why XYZ Company Email	2 040	Wants to send to others
Lsharp ▼	12/17/00	A2-1 Leave Voice Mail #1		1.150	
▼	12/17/00	A1-4 Brochure		1.120	
▼	12/10/00	A1-3 3rd Postcard		1 090	
▼	12/3/00	A1-2 2nd Postcard		1 060	
▼	11/25/00	A1-1 1st Postcard		1.030	



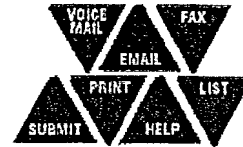
FIG. 25/62

530 ↗



Herbert Ficus  
CEO  
800-456-7890  
hficus@plantsunlimited.com  
x\_ Email Permission

Plants Unlimited  
17 Green Street  
Suite 100  
San Francisco CA 94123  
CEL# 5 535



## INTERACTION

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship

- Reports
- Utility

- Select Contact Information
- Select Profiling Questions
- Select Knowledge Screening

Choose From  Choose From  Choose From

## Planned Interaction

Date	Interaction
02-26-01	C4-7 Follow Up Initial Contract



## Current Interaction

User	Date	Interaction	Response
NPatel	02-26-01	Choose From <input type="button" value="v"/>	C4-7a Left Voice Mail <input type="button" value="v"/>
		C4-7 Follow Up Initial Contract	C4-7e Signs Contract!

Notes Wants Clarence Orchid, his administrative assistant, to meet Customer Care team Friday and start immediately.



Next Interaction Date	Next Interaction
02-28-01	Choose From <input type="button" value="v"/>
	C4-8 Hand Off To Customer Care



560 ↗

## Interaction Record

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FIG. 26/62

User Edit	Date	Interaction	Response	CEL#	Notes
Npatel ▼	2/21/01	C4-7 Follow Up Initial Contract	C4-7a Left Voice Mail	5 535	
Npatel ▼	2/16/01	C4-4 Thank You For Contract	C4-4a Thank You Note	5 475	Will check back 2/21
Npatel ▼	2/15/01	C4-3 Deliver Premium Contract		5 355	Just what Herbert wanted. Will take a couple of weeks to get through Legal
Npatel ▼	2/10/01	C4-1 Set Initial Contract Meeting		5 205	Will only have 30 minutes.
Npatel ▼	2/5/01	C3-9 Thank You Follow Up	C3-9b Thank You Email	5 130	Thanks for getting answers needed.
▼	2/4/01	A4-1 Monthly Email Tip		5 040	
Npatel ▼	2/4/01	C3-8 Follow Up Meeting Initial Proposal	C3-8t WANTS A CONTRACT!	5 000	The kicker was our track record and comfort level.
Npatel ▼	2/1/01	C3-7 Follow Up Initial Proposal	C3-7i Set Follow Up Meeting	4.999	Needs others to agree.
Npatel ▼	1/25/01	C3-4 Thank You For Initial Proposal	C3-4a Thank You Note	4.999	

FIG. 27/62

↑  
570

Npatel ▼	1/24/01	C3-3 Deliver Premium Initial Proposal		4 999	Feels good
Npatel ▼	1/20/01	C3-1 Set Initial Proposal Meeting		4.895	
Npatel ▼	1/15/01	C2-7 Thank You For Facts	C2-7b Thank You Email	4 820	
Npatel ▼	1/14/01	C2-5 Meeting On Facts	C2-5d Our Facts Have Enough	4.730	
Npatel ▼	1/12/01	C2-4 Set Meeting Confirm Facts		4 680	
Npatel ▼	1/10/01	C2-3 Premium Fact Finding		4.605	Very cooperative
Npatel ▼	1/9/01	C2-1 Follow Up Fact Finding	C2-1i Set Meeting To Get Facts	4.455	Doesn't have time to do on own afterall. Wants us to do.
Npatel ▼	1/4/01	C1-2 Thank You For Appointment	C1-2a Thank You Note	4.380	Offered to get facts, if need be
Npatel ▼	1/3/01	C1-1 Initial Appointment	C1-1bb Customer To Develop Facts	4.260	Wants to do as much as they can, thinks will be faster.
Npatel ▼	1/2/01	A4-1 Monthly Email Tip		4.210	

FIG. 28/62

580 ↗

Npatel ▼	1/2/01	C1-1 Initial Appointment	C1-1a Confirm Appointment	4.170	
Lsharp ▼	12/21/00	A2-7 Ongoing Thank You	A2-7a Thank You Note	4.120	Reminded name of person who will come to see
Lsharp ▼	12/21/00	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt	4.000	Has a go ahead from others.
Lsharp ▼	12/20/00	A2-6 Live Conversation	A2-6a Call Back 12/21/00	2.080	Doesn't have feedback yet on email.
Lsharp ▼	12/19/00	A2-6 Live Conversation	A2-6d Send Why XYZ Company Email	2.040	Wants to send to others
Lsharp ▼	12/17/00	A2-1 Leave Voice Mail #1		1.150	
▼	12/17/00	A1-4 Brochure		1.120	
▼	12/10/00	A1-3 3rd Postcard		1.090	
▼	12/3/00	A1-2 2nd Postcard		1.060	
▼	11/25/00	A1-1 1st Postcard		1.030	

FIG. 29/62

590<sup>7</sup>



FIG. 30/62





Herbert Ficus  
CEO  
800-456-7890  
hficus@plantsunlimited.com  
x\_ Email Permission

Plants Unlimited  
17 Green Street  
Suite 100  
San Francisco CA 94123  
CEL# 6 000



## INTERACTION

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility

Select Contact Information

Select Profiling Questions

Select Knowledge Screening

Choose From

Choose From

Choose From

### Planned Interaction - 622

Date	Interaction
02-28-01	C4-8 Hand Off To Customer Care

EDIT

### Current Interaction - 624

User	Date	Interaction	Response
JKauke	02-28-01	Choose From <input type="button" value="v"/> C4-8 Hand Off To Customer Care	Choose From <input type="button" value="v"/>

Notes Went smoothly. Clarence to get back to me on minor change to contract. Herbert stopped by, says will be try to be there when we deliver Gizmo Report.

ADD

Next Interaction Date	Next Interaction
03-01-01	Choose From <input type="button" value="v"/> R1-1 Set Meeting Report/Survey #2

REPLACE

### Interaction Record

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FIG. 31/62

636

632

630



		Initial Proposal	Follow Up Meeting		
Npatel ▼	1/25/01	C3-4 Thank You For Initial Proposal	C3-4a Thank You Note	4 999	
Npatel ▼	1/24/01	C3-3 Deliver Premium Initial Proposal		4 999	Feels good.
Npatel ▼	1/20/01	C3-1 Set Initial Proposal Meeting		4 895	
Npatel ▼	1/15/01	C2-7 Thank You For Facts	C2-7b Thank You Email	4 820	
Npatel ▼	1/14/01	C2-5 Meeting On Facts	C2-5d Our Facts Have Enough	4.730	
Npatel ▼	1/12/01	C2-4 Set Meeting Confirm Facts		4.680	
Npatel ▼	1/10/01	C2-3 Premium Fact Finding		4 605	Very cooperative.
Npatel ▼	1/9/01	C2-1 Follow Up Fact Finding	C2-1i Set Meeting To Get Facts	4.455	Doesn't have time to do on own afterall. Wants us to do.
Npatel ▼	1/4/01	C1-2 Thank You For Appointment	C1-2a Thank You Note	4 380	Offered to get facts, if need be

FIG. 33/62

7  
640

Npatel ▼	1/3/01	C1-1 Initial Appointment	C1-1bb Customer To Develop Facts	4 260	Wants to do as much as they can, thinks will be faster
▼	1/2/01	A4-1 Monthly Email Tip		4 210	
Npatel ▼	1/2/01	C1-1 Initial Appointment	C1-1a Confirm Appointment	4 170	
Lsharp ▼	12/21/00	A2-7 Ongoing Thank Yous	A2-7a Thank You Note	4.120	Reminded name of person who will come to see.
Lsharp ▼	12/21/00	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt	4 000	Has a go ahead from others
Lsharp ▼	12/20/00	A2-6 Live Conversation	A2-6a Call Back 12/21/00	2.080	Doesn't have feedback yet on email.
Lsharp ▼	12/19/00	A2-6 Live Conversation	A2-6d Send Why XYZ Company Email	2.040	Wants to send to others.
Lsharp ▼	12/17/00	A2-1 Leave Voice Mail #1		.1.150	
▼	12/17/00	A1-4 Brochure		1.120	
▼	12/10/00	A1-3 3rd Postcard		1 090	

FIG. 34/62

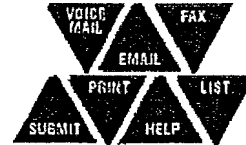
↑  
650





Contact  
Title  
Phone  
Email  
\_ Email Permission

Company.  
Address1  
Address2  
City/State/Zip  
CEL#



## ADD CONTACT

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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Relationship  
Tracking  
System

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Select Contact  
Information

Select Profiling  
Questions

Select Knowledge  
Screening

Choose From ▼

Choose From ▼

Choose From ▼

Salutation:	
First Name:	
Middle Name:	
Last Name:	
Title:	
Company:	
Address1:	
Address2:	
City:	
State:	
Zipcode:	
Phone:	
Extension:	
FAX:	
Cell Phone:	
Pager:	
Voice Mail:	
800#:	
Email:	
Secondary Email:	
URL:	
Starting CEL #	
Reference #:	
Source:	
Source Details:	
Customer #:	

FIG. 36/62

680J ↑

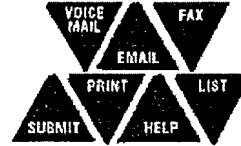


↑  
730



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x\_ Email Permission

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17 Green Street  
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San Francisco, CA 94123  
CEL# 6 000



### CONTACT INFORMATION COMPANY DATA



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Tracking  
System

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#### Select Contact Information

Choose From

#### Select Profiling Questions

Choose From

#### Select Knowledge Screening

Choose From

Salutation:	Mr.
First Name:	Herbert
Middle Name:	T
Last Name:	Ficus
Title:	CEO
Company:	Plants Unlimited
Address1:	17 Green Street
Address2:	Suite 100
City:	San Francisco
State:	CA
Zipcode:	94123
Phone:	415 456 7890
Extension:	
FAX:	
Cell Phone:	
Pager:	
Voice Mail:	
800#:	456 7890
Email:	hficus@plantsunlimited.com
Secondary Email:	
URL:	www.plantsunlimited.com
Starting CEL #	1.000
Reference #:	CA Test 1
Source:	List A, Telemarketing
Source Details:	Terrific Lists
Customer #:	

FIG. 38/62

780

Prefers Reach Via:	Email
On job (years)	25
As (title) (years)	CEO, 20
Gender:	
Age:	25
Delivery Team:	LSharp, Npatel, JKauke
Alternative Address1:	
Alternative Address2:	
Alternative City:	
Alternative State:	
Alternative Zipcode:	



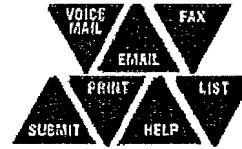
800  
↑

**FIG. 39/62**



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x\_ Email Permission

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CEL# 6 000#



### CONTACT INFORMATION PERSONAL DATA

Select Contact  
Information

Select Profiling  
Questions

Select Knowledge  
Screening

Choose From ▼

Choose From ▼

Choose From ▼

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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System

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Home Address1:	
Home Address2:	
Home City:	
Home State:	
Home Zip code:	
Home Phone:	
Home FAX:	
Home Cell	
Phone:	
Home Voice	
Mail:	
Home Pager:	
Home Email:	
URL:	
Referral Source:	
Referral Details	
Affinity	
Organization:	
Cause:	CNPS
Person:	
Other:	
Special Interests	
Hobbies:	
Sports:	
Activities:	
Culture:	
Music:	Jazz
Food:	
Drink:	Water
Other	

FIG. 40/62

830 ↗



Personal	
Spouse:	
Significant Other:	
Child:	
Other relative:	
Friend:	Jacob Bills
Pet:	Sierra Cat
Birthday	00/00/00



FIG. 41/62

860



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CEL# 6 000



## CONTACT INFORMATION RELATIONSHIPS

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

UNIFY

Select Contact  
Information

Select Profiling  
Questions

Select Knowledge  
Screening

Choose From

Choose From

Choose From

Go To	Contact	Title	City	Phone	Relationship	CEL#
	Hope Blooms	CFO	San Francisco	800-456-7890	Influencer	4.999
	Gratze White	Chairman	San Francisco	800-456-7890	Boss	4.999
	Tom Paz-ion	Engineer	Los Angeles	888-725-4444	None	2.040
	Nielson Love	COO	San Francisco	800-456-7890	Unknown	1.000
	Jill O'Joy	Manager	San Francisco	800-456-7890	Billing	6.000
	Fred Ready	Foreman	San Francisco	800-456-7890	Receiving	6.000
	Clarence Orchid	Aide	San Francisco	800-456-7890	Assistant	6.000



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Tracking  
System

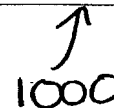


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FIG. 42/62

890 ↑





IF NO: Do you plan to add more gizmos soon? IF STILL NO, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.	
IF YES, CONTINUE:	
2. Is it important that you have gizmos? (YES/NO) How important is it-on a scale of 1 to 5 with 5 being really important? (ANSWER HAS TO BE 3 TO 5. IF LESS THAN 3, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.)	5
3. What would you say the complaint level is on what you have to deal with-on a scale of 1 to 5 with 5 being really bad? (ANSWER HAS TO BE 3 TO 5. IF LESS THAN 3, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.)	5
4. What about gizmo use? Is it high or low-on a scale of 1 to 5 with 5 being really high? (ANSWER HAS TO BE 3 TO 5. IF LESS THAN 3, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.)	5
5. How are you handling the situation now? Are you doing it yourselves or do you have a contract? (THEMSELVES IS A GO NOW.)	Themselves
6. If a contract: What is the contract for? (LIMITED CONTRACT IS GOOD.)	
(Wherever you stop in questions #1-6, assuming they have given the right answers):	
7. It sounds like we might have a fit. I'd like to set up an appointment. When would work best for you? (Details on who the appointment will be with, etc.)	Wants Why XYZ Company email first.
*****SET APPOINTMENT DATE AND TIME	
*****SET CALL BACK TIME	12/21/00
*****DON'T DO IF YOU HAVE ALREADY DONE THIS!!! IF YOU SENT THE WHY XYZ COMPANY EMAIL, YOU HAVE DONE THIS!!!	
8. I'd like to put you on our email list so we can send you tips about gizmos. May I get your email address? (Or confirm it, if you have it.)	hfcus @ PlantsUnlimited.com
*****PUT ON EMAIL LIST. (YES/NO)	Yes
*****SEND FIRST EMAIL TIP (YES/NO)	
*****SEND WHY XYZ COMPANY (YES/NO)	Yes
9. Just curious. Had (or have) you heard of XYZ Company before?  *****HEARD OF XYZ Company (Unaware, Aided Aware, Aware)	Aided Aware

FIG. 45/62

100  
↑

<p><b>QUALIFIED CLOSE:</b>          Either I know _____ will look forward to meeting with you. Or We look forward to meeting with you when the time is right and in the meantime, you'll get our gizmo email tips. You may want to visit our Web site at <a href="http://www.XYZCompany.com">www.XYZCompany.com</a>. Thank you for your time.</p>	
<p><b>NOT QUALIFIED CLOSE:</b>          Our contract only makes sense for companies with more than 75 gizmos, so I'm afraid this would not be worth your time right now. May I check back with you in the future?</p>	
<p>*****CHECK BACK IN FUTURE (YES/NO)</p>	
<p>*****AT END OF CALL CHOSE RIGHT CALL RESPONSE AND TAKE ACTION TO FULFILL COMMITMENTS TO CONTACT.</p>	
<p>Assess quality of contact as influencer on Scale 1 to 5 with 5 being top for:</p>	
<p>External</p>	
<p>Internal</p>	
<p>*****CONFIRM CONTACT INFORMATION.</p>	



FIG. 46/62

1020 ↗



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CEL# 4 000



### PROFILING QUESTIONS CLOSING

Select Contact  
Information

Select Profiling  
Questions

Select Knowledge  
Screening

Choose From

Choose From

Choose From

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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System

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Ongoing Closing Questionnaire:	
1. Most common complaints about gizmos?	
2. How long have you been on the job?	25 years
3. How long has your company been in business?	25 years
4. What is your revenue? ____ actual or range:	\$100-500 million
5. Type of business?	
6. How many locations?	3
7. Yours is the ____, right?	Headquarters
8. You have between ____ number of people now, right?	1,000-4,999
9. Growth expectations over the next year in terms of people? ____ %	
10. I have these names of others in your company who would be involved in contracting for gizmos _____. Tell me about them and their role. What is the process to get a contract signed in your organization? What can you do to move the process along? (Probe on the next steps.) Can you carry the ball on this or do we need to meet with some of the other people?	
11. We need a signed contract, the first payment and a purchase order a week prior to the start. When can we start? Set a realistic start date. Working backwards from that date organize getting the information needed to do a proposal.	03/01/00
12. Note competition if any.	ABC Company
13. Set closing status (A This month, B In next days, C In next 60 days)	
14. Once a signed contract:	
a. Note: Contract length:	3 years
Yearly revenue:	\$35,000
Monthly revenue:	2,917
# of locations under contract	1
b. Get an XYZ Company internal customer # assigned.	

FIG. 47/62

↑  
1030

c. Determine Customer Lifetime Value (CLV) potential	
d. Set time to bring in Customer Care people to meet with their key staff members.	
15. After each encounter with person,	
a. Set closing priority. (Scale 1 to 5 with 5 being top.)	5
b. Determine revenue potential on scale 1 to 5 with 5 being top for Up Sell Cross sell Increase Volume	
c. Assess quality of contact as influencer on scale 1 to 5 with 5 being top for External Internal	
d. Assess Awareness Level for attitude towards purchase (Consideration, Intended).	
e. Categorize Attitude on scale 1 to 5 with 5 being top for Embracing Attitude Overcoming Attitude	
f. Add to Contact Information.	



FIG. 48/62

↑  
1040





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## PROFILING QUESTIONS RETENTION

Select Contact  
Information

Select Profiling  
Questions

Select Knowledge  
Screening

Choose From

Choose From

Choose From

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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### Ongoing Retention Questionnaire

1. Most common gizmos?	
2. Who decides the type of gizmo to purchase within the organization?	
3. Any cultural issues regarding gizmos?	
4. Number of people employed at specific locations?	
5. Number of gizmos per location?	
6. Any changes in locations planned?	
7. Any specialist departments who operate more than normal hours?	
8. Any major changes, trends in your industry and how are they affecting you?	
9. Any major changes, trends in your company and how are they affecting you?	
10. Any major changes, trends in your company's gizmo requirements and how are they affecting you?	
11. Coordinate with Internal Sales as renewal time nears.	
a. Assess Retention Status (A Assured, B Some Issues, C Uncertain)	
b. Determine Customer Maintenance Level (scale 1 to 5 with 5 being high)	
c. Determine Net Contribution to date.	
12. Assess quality of this customer as a reference (A Unconditional, B Conditional)	
13. After each encounter with person:	
a. Set Retention Priority (scale 1 to 5 with 5 being top )	
b. Determine revenue potential on scale 1 to 5 with 5 being top for Up Sell Cross Sell Increase Volume	
c. Assess quality of contact as influencer on scale 1 to 5 with 5 being top for External Internal	
d. Add to Contact Information	

FIG. 49/62

1050



FIG. 50/62

1060 ↗



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**PROFILING  
QUESTIONS  
RETENTION**

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility

**Select Contact  
Information**

Choose From ▼

**Select Profiling  
Questions**

Choose From ▼

**Select Knowledge  
Screening**

Choose From ▼

**New Customer Survey #1:**

Customer Satisfaction:	
Just wanted to check in with you and see if everything is going smoothly for you as we get started working with you. We don't want things ever to just be okay. We want things to be so wonderful that you'll be telling others about us.	
1. Have we treated you right in making the transition?	
2. Anything I should be watching out for?	
3. Anything you are concerned about?	
4. So I make sure to pay special attention to it, is there anything that you are particularly looking forward to in working with us?	
(Answers will indicate new CEL level or validate that they remain in old one. Note change in level here and any general comments. Primary evaluation here is, has XYZ Company moved past Expectant or Trial levels or not? Does anything need to be done now to ensure that this contact becomes a Loyal customer at a minimum?)	
Industry Trend Information:	
5. Any major changes, trends in your industry and how are they affecting you?	
6. Any major changes, trends in your company and how are they affecting you?	
7. Any many changes, trends in your company's gizmo requirements and how are they affecting you?	
Targeting Information:	
9. Where do you get your information about the gizmo industry? (Publications, conferences, trade shows, people.)	
10. Who do you listen to?	
11. Who do you think of as a thought leader? Would XYZ Company be on your list?	
12. If they are not already on it: Would you like to be on our email list for a Free Gizmo Email Tip of the Month?	



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**FIG. 51/62**

1070 →

Free Gizmo Email Tip of the Month:

13. Add to Contact Information.	
---------------------------------	--



FIG. 52/62

1080 ↗



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X Email Permission

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San Francisco CA  
94123  
CEL# 6 000



**KNOWLEDGE  
SCREEN  
RELATIONSHIP  
VALUE**

**Select Contact Information** **Select Profiling Questions** **Select Knowledge Screening**

Choose From  Choose From  Choose From

- ☐ Interaction
- ☐ Priority Action
- ☐ Search Contact
- ☐ Add Contact
- ☐ Add Relationship
- ☐ Reports
- ☐ Utility

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Tracking  
System

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Customer Lifetime Value (CLV)	
Potential (three years)	\$282,592
Net Contribution (to date)	
Difference	
Revenue Potential Rating	
Up Sell	
Cross Sell	
Increase Volume	
Buzz Influence	
# Referrals	
# References	
# Testimonials	
Influencer Rating	
External	4
Internal	
Acquisition Value	
Put on Email List	Yes
Check Back Later	
Closing Value	
Priority	5
Closing Status	this month
Retention Value	
Priority	
Retention Status	
Customer Maintenance Level	

← 109

1092

1090 ↗

**FIG. 53/62**



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x Email Permission

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CEL# 6 000



**KNOWLEDGE  
SCREEN  
PRODUCTS/  
SERVICES**

Select Contact  
Information

Select Profiling  
Questions

Select Knowledge  
Screening

Choose From ▼

Choose From ▼

Choose From ▼

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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System

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# Gizmos:	175
Importance:	5
Problems With:	5
Gizmo Use:	5
How Handle:	Themselves
Most Common Complaints:	
Major Issues:	
Contract Length:	3 years
Start Date	03/01/01
Yearly Revenue:	\$360,000
Monthly Revenue:	\$30,000
# of Locations under Contract:	1



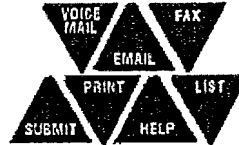
**FIG. 54/62**

1100



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**KNOWLEDGE  
SCREEN  
PRODUCTS/  
SERVICES**

**Select Contact  
Information**

**Select Profiling  
Questions**

**Select Knowledge  
Screening**

Choose From

Choose From

Choose From

**Interaction**

**Priority Action**

**Search Contact**

**Add Contact**

**Add Relationship**

**Reports**

**Utility**



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Relationship  
Tracking  
System**

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# Gizmos:	175
Importance:	5
Problems With:	5
Gizmo Use:	5
How Handle:	Themselves
Most Common Complaints:	
Major Issues:	
Contract Length:	3 years
Start Date	03/01/01
Yearly Revenue:	\$35,000
Monthly Revenue:	\$2,917
# of Locations under Contract:	1



1110 ↑

**FIG. 55/62**



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CEL# 6 000



**KNOWLEDGES  
SCREEN  
COMPANY  
INFORMATION**

**Select Contact  
Information**

**Select Profiling  
Questions**

**Select Knowledge  
Screening**

Choose From

Choose From

Choose From

**Interaction**

**Priority Action**

**Search Contact**

**Add Contact**

**Add Relationship**

**Reports**

**Utility**



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Size:	\$100-500 million
SIC Code:	
Industry:	Industry
Other:	
Type of Business:	
Year End:	12/31
Years in Business:	25
Credit Code:	Very Good
Metro:	SFO San Francisco
Enterprise Status:	Headquarters
# Employees:	1,000-4,999
Expected Growth:	
# Locations:	3



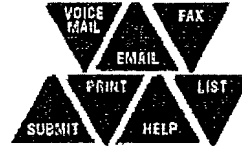
1120 ↑

**FIG. 56/62**



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800-456-7890	Suite 100
hficus@plantsunlimited.com	San Francisco CA 94123
x_ Email Permission	CEL# 6 000



### Select Contact Information

## Select Profiling Questions

## Select Knowledge Screening

Choose From

Choose From

Choose From

## Acquisition

Date	Saw Marketing Materials	Awareness Level
12/2/00	Yes	Aided Aware

## Closing

Date	Feedback Notes	Awareness Level

## Retention

Date	Survey Notes	Satisfaction Level	Modified CEL Level

## Targeting Research Commentary

Independent study 8/12/00 tested potential for XYZ Company. XYZ relatively unknown, but critical need found with companies that have more than 150 gizmos and over \$100 million in revenue.

Awareness:	Unaware
------------	---------

## Tracking Research Commentary

Independent study 12/27/00 rated XYZ Company against its competitors. XYZ being considered more frequently than ABC Company by a ratio of 10:1.

Awareness:	Consideration
------------	---------------

## Competition

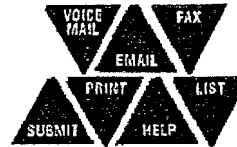
ABC Company





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CEL# 6 000



## ADD RELATIONSHIP

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



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Relationship  
Tracking  
System

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Select Contact  
Information

Choose From ▼

Select Profiling  
Questions

Choose From ▼

Select Knowledge  
Screening

Choose From ▼

Relationship:	Administrative Assistant
Salutation:	Mr.
First Name:	Clarence
Middle Name:	
Last Name:	Orchid
Title:	Aide
Company:	Plants Unlimited
Address1:	17 Green Street
Address2:	Suite 100
City:	San Francisco
State:	CA
Zipcode:	94123
Phone:	415-456-7890
Extension:	
FAX:	
Cell Phone:	
Pager:	
Voice Mail:	
800#:	456-7890
Email:	corchid@plantsunlimited.com
Secondary Email:	
URL:	www.plantsunlimited.com
Starting CEL #:	6.000
Reference #:	CA Test 1-add
Source:	CA Test 1
Source Details:	Herbert Ficus
Customer #	
Prefers Reach Via:	E-mail ▼

FIG. 59/62

1150 ↗





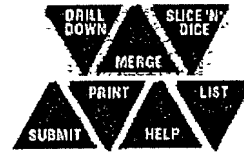
## REPORTS



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## Relationship Tracking System

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## Reports

### Input Templates:

Strategic Brand Readiness (SBR) Factor Template  
Customer LifeCycle Profitability Model Template  
Interaction ROI (I ROI) Template

### Reports:

## Strategic Brand Readiness (SBR) Summary Report

### Customer LifeCycle Profitability Model Alternative Strategies Comparison

## Customer LifeCycle Profitability Model Summary Report

## Interaction ROI (I ROI) Summary Reports

### Phase Level Process

## Phase Level Events

## CEL Level Process

### CEL Level Events

### Individual Interaction ROI (1 ROI) Report

### Interaction ROI (I ROI) Model Report

### Individual Correlation with Awareness/Satisfaction Research

### Correlation with Awareness/Satisfaction Research

## Deposition of Contacts Summary Reports

### By Phase Level

By Status

By Origination

## Top Priority Customers Profile Reports

### Characteristics

### Attributes

**FIG. 61/62**

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## STRATIX Relationship Tracking System Map

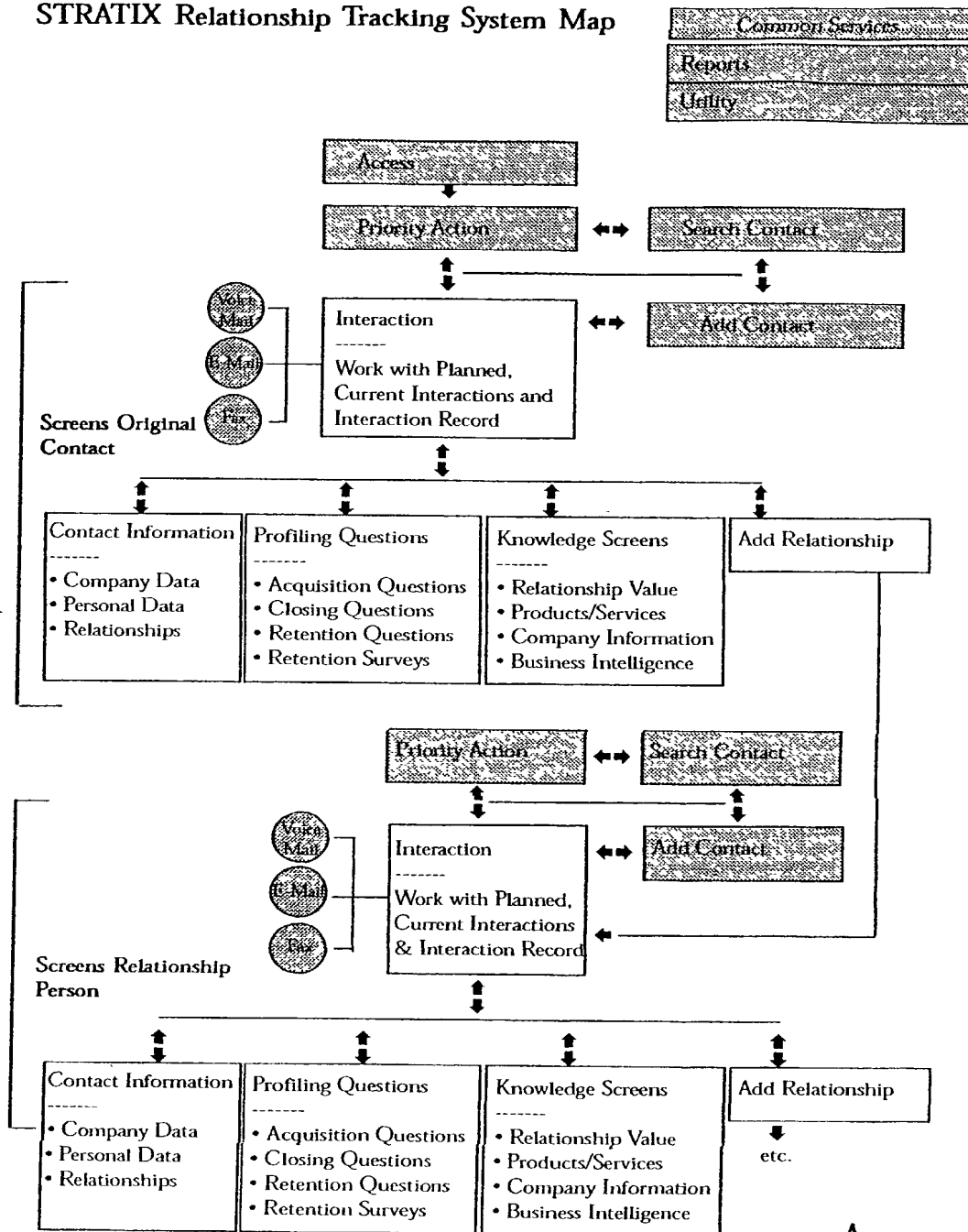


FIG. 62/62

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